Automated reporting

Agree the numbers, review process, and delivery checks before launch.

Data / Calculations / Approval

Project / owner _____ Review date _____

Scope And Inputs

- [ ] Define the reporting cohort, reporting period, time zone, and cutoff.
- [ ] Identify each source system and the person responsible for its data.
- [ ] Define required identifiers, dates, amounts, and permitted status values.
- [ ] Agree duplicate detection and handling of conflicting source records.

Calculations And Narrative

- [ ] Document each metric, its exclusions, and its denominator.
- [ ] Reconcile calculated totals against an independently checked reference dataset.
- [ ] Distinguish job value, invoiced amounts, and collected payments.
- [ ] Link statements in the draft summary to supporting records.
- [ ] Test unsupported causes, missing information, and absent comparison periods.

Scope decisions

Illustrative planning resource. Agree project-specific criteria before implementation.

Automated reporting

Acceptance testing and operational readiness.

Data / Calculations / Approval

Project / owner _____ Review date _____

Review And Distribution

- [ ] Assign a report owner and define approval of a specific version.
- [ ] Require renewed approval when source changes affect an approved report.
- [ ] Check recipient permissions and approved distribution channels.
- [ ] Record delivery outcomes and handle ambiguous responses before resending.

Failures And Handover

- [ ] Test unavailable sources, incomplete exports, and duplicate identifiers.
- [ ] Verify that an incomplete run cannot silently publish a current report.
- [ ] Document recovery, support responsibilities, and source update procedures.
- [ ] Record acceptance results and outstanding limitations before launch.

Open items / owner / next action

Planning resource for an illustrative workflow. Agree project-specific criteria and record test evidence before release.